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| **When in lifecycle** | **Services for Researchers** | **Services for librarians and research managers** | **Services and Projects** | **Update- July 2015** |
| **On submitting an article to a journal** | Information on journal OA policies, and how they enable you to comply with your funder policy | Information on journal OA policies, and how they enable your researchers to comply with their funder policy | **Sherpa Romeo**  **Sherpa Juliet**  **Sherpa Fact** | [Sherpa/FACT](http://www.sherpa.ac.uk/fact/index.php?la=en) accuracy: SHERPA/FACT has been found to have accuracy score of over 95% which makes it an invaluable tool for checking whether publishers’ policies provide for compliance with research funders’ open access requirements More information [here](http://scholarlycommunications.jiscinvolve.org/wp/2015/07/02/repository-and-open-access-managers-welcome-findings-on-sherpafact-accuracy/)  [Sherpa/Juliet](http://www.sherpa.ac.uk/juliet/index.php) and the [schema for OA policies](http://scholarlycommunications.jiscinvolve.org/wp/2014/12/01/a-schema-for-oa-policies/): While considered complete, this is still a rather intimidating spreadsheet, and so Jisc is talking with potential partners about whether a simple interface can be built onto it, to make it easier to use. Timescales TBC  [Sherpa/RoMEO](http://www.sherpa.ac.uk/romeo/). Jisc has now engaged a group of institutions, funders and publishers to discuss the clarity of publisher OA policies and further discussion will take place at a workshop planned for Sept / Oct |
| **On acceptance of the article by the journal** | Automatic notification to (and perhaps deposit of the article into) your institutional repository | Automatic notification to (and perhaps deposit of the article into) your institutional repository | **Publications Router** | Demand for a service to help institutions capture their research outputs remains unabated, and any drive to help automate it will need to break challenging new ground. Therefore, Jisc Publications Router is now set for a new phase of development as it seeks to do just that. It aims to become a permanent service in 2016, expanding at an accelerated pace the range of content it can deliver. Work on CORE, Monitor and Router will be coordinated in 15-16, to make sure we deliver a really coherent and useful set of services for UK universities in the first half of 2016. More information is available [here](http://scholarlycommunications.jiscinvolve.org/wp/2015/07/01/jisc-publications-router-enters-a-new-phase/) |
| **On payment of APC** |  | Offset arrangements to save costs for institutions | **Jisc Collections Negotiations** | We have published [a list of “desiderata”, or things that universities and Jisc would like journal publishers to do, that would help universities comply with funder OA policies](http://scholarlycommunications.jiscinvolve.org/wp/2015/03/26/how-publishers-might-help-universities-implement-oa/). This has also prompted discussion. We have been through this list with the Publishers Association (PA) and Association of Learned and Professional Society Publishers (ALPSP), with individual publishers, with [CHORUS](http://www.chorusaccess.org/) and, most recently, with a group of publishers at a workshop co-organised by Jisc and the PA. As a result, we will revise the “desiderata” document, giving some next steps on many of the points raised. We will also consider how a version of the list might be made more internationally relevant, and discuss with European and North American colleagues.  We have published [a set of principles for offsetting agreements with publishers](http://www.jisc.ac.uk/blog/offsetting-agreements-for-open-access-publishing-13-apr-2015), based on our experiences so far. This has prompted some discussion and features now in our negotiations with publishers on this issue.  Updates on negotiations with publishers are given to [the Jisc Electronic Information Resources Working Group](http://www.jisc-collections.ac.uk/About-JISC-Collections/Advisory-Groups/Electronic-Resources-Information-Group/) at each meeting, and summaries of those meetings posted on the Jisc Collections website. The next meeting is on 7th September. |
|  |  | Data collection, collation and analysis to allow benchmarking, etc | **Total Cost of Ownership** | Preparation is underway for the January 2016 round of data collection, and a mid-point round of 2015 data collection is being undertaken to help support an investigation into the effects of offsetting schemes. Version 2 of the data collection template has been finalised for release on 31 July, and this can also be used for reporting to RCUK. The data that is gathered will feed into the Jisc Monitor national APC aggregation service that is currently in development. |
| **On publication of the article** | Raising the visibility, reach  and impact of your article on  the internet | Rendering the article effectively in library discovery services | **CORE**  **ORCID** | Jisc senior management have agreed that we should work with the Open University to develop a partnership agreement to underpin the delivery of CORE, the global aggregation of OA content. Work on CORE, Monitor and Router will be coordinated in 15-16, to make sure we deliver a really coherent and useful set of services for UK universities in the first half of 2016.  August: CORE are also working with OpenAIRE to pass aggregate RIOXX records from UK repositories to OpenAIRE. This is currently being tested. The RIOXX records will then be transformed to OpenAIRE compliant records. In the long term this will lessen the burden on Repository Managers to have to comply with RCUK requirements (RIOXX) and OpenAIRE compliance. This does require repositories to start to collect RIOXX compliant records.  A national consortium membership agreement has been negotiated by Jisc Collections with ORCID. This will enable universities to benefit from reduced ORCID membership costs and enhanced technical support. This should accelerate adoption and provide a smoother path to ORCID integration for UK universities. To find out how to sign up for national consortium membership visit the [Jisc Collections website](http://www.jisc-collections.ac.uk/Catalogue/Overview/Index/2235) |
|  | Confirmation that your article has been published on appropriate OA terms | Confirmation that the article has been published on appropriate OA terms | **Jisc Monitor** | After preparing outline business cases for [Jisc Monitor](http://jiscmonitor.jiscinvolve.org/wp/), we now have senior Jisc backing to develop these as services, to be supported by Jisc pending full business cases in the spring of 2016. Planning to move from prototype to service status has just got underway and more information about the timescales for the development and roll-out of these two services will be posted here very soon by [Jo](http://www.jisc.ac.uk/staff/jo-lambert) Lambert (Monitor), but we are working to a July 2016 deadline, with the expectation that the services will in fact be operational well before then. Work on CORE, Monitor and Router will be coordinated in 15-16, to make sure we deliver a really coherent and useful set of services for UK universities in the first half of 2016. |
|  | Automatic deposit of your article from Europe PubMed Central and eLife into your institutional repository | Automatic deposit of your article from Europe PubMed Central and eLife into your institutional repository | **Jisc Publications Router** | See above |
| **On monitoring/ reporting compliance to funders** | Making it easier for you to keep your ORCID record up-to-date | Collation of data allowing librarians and research managers to monitor published articles, expenditure and compliance | **Jisc Monitor**  **OpenAire** | See above  Information has been circulated to research librarians, research managers, open access contact points and EU research, policy and funding teams to provide more detailed information and support on the Horizon 2020 Open Access policy requirements and guidance on how researchers can take part in the [Horizon 2020 Open Research Data Pilot](https://www.openaire.eu/openaire-open-research-data-pilot-factsheet/download) and the [FP7 Post-Grant Open Access Pilot](https://www.openaire.eu/goldoa/fp7-post-grant/pilot). This is in Jisc’s capacity as the UK National OA Desk in the OpenAIRE project. More information is available [here](http://scholarlycommunications.jiscinvolve.org/wp/2015/07/17/openaire2020-national-open-access-desk/) |
|  |  | Supporting institutions to keep track of their researchers’ articles by taking advantage of the global ORCID initiative | **ORCID** | See above |
|  |  | Ensuring efficient data flows across the system | **RIOXX;**  **CASRAI** | RIOXX EPrints plug-in is ready to use.  July: RIOXX DSpace plug-in is ready to use.  RIOXX metadata fields support RCUK compliance and some of the REF metadata requirements.  Note that a REF plug-in is under development and the deadline for release is to be confirmed.  Aug/Sept: CASRAI OA working group will release a candidate profile for OA reporting, documenting UK funder reporting requirements. |
| **On someone downloading the article** | Usage reports for you as the article’s author (via your institutional repository) | Usage reports for articles authored from the institution | **IRUS-UK** | July: IRUS-UK and CORE will have implemented technology to enable downloads from CORE to be included in the reports for the repositories from which those items were harvested by CORE. |
|  |  | Benchmark usage figures across all participating institutions | **IRUS-UK** | IRUS-UK enables UK IRs to access and share comprehensive and comparable usage statistics using the COUNTER standard. The number of participating repositories is currently 87 and steadily rising. |
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